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NATIONAL RESTAURANT ASSOCIATION
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NATIONAL TREND OF BUSINESS
Restaurant Industry

A SERVICE TO THE CLIENTS OF LAVENTHOL & HORWATH

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LAVENTHOL & HORWATH

APRIL 1982 COMPARED WITH APRIL 1981

The average receipt per cover in April was $8.39, 3.0 percent over last year. This increase in the average receipt helped boost food and beverage sales by 3.5 percent. Food sales rose by 3.2 percent while beverage sales increased by 4.8 percent in April. Food sales were 83.1 percent of total sales this month, slightly less than one year ago. Beverage sales were 16.9 percent this month versus 16.6 percent last year.

Food, beverage and payroll costs increased over last year by an average 4.4 percent. Beverage costs were the only category that did not increase as much as sales, rising only 1.1 percent versus a 4.8 percent increase in sales. Food costs per dollar of sales remained at $0.38 while beverage costs per dollar of sales dropped slightly to $0.26 in April of this year.

Productivity results for April were mixed. Both sales and payroll per full-time equivalent employee increased 4 percent, while covers per full-time equivalent declined slightly. On a year-to-date basis, sales and payroll per full-time equivalent employee increased 2.7 percent and 3.3 percent respectively.

As inflation slows, restaurant management must make every effort to hire experienced and talented personnel that will be able to capitalize on this recent (and hopefully, permanent) economic change. Since 1982 was the first year that the industry was not confronted with an automatic increase in minimum wage, management needs to be able to use this to their advantage. Menu price increases will not be accepted as readily as in the past, and as a result, any increase in profit margins will have to come from improved opertions.

SALES PER SEAT FOR MAJOR CLASSIFICATIONS

		This Month	Percentage Changes*
TOTAL	$	386.26	3.2%
AREA:			
Northeast		344.52	5.7
Southeast		517.66	– 6.9
North Central		262.91	– 0.3
South Central		**	**
West		598.85	0.7
TYPE:			
Cafeteria		**	**
Coffee Shop		500.71	2.9
Full Menu:			
Tableservice		381.89	3.0
Limited Menu:			
Tableservice		375.34	0.0
No Tableservice		**	**

FOODSERVICE PRODUCTIVITY TOTAL SALES PER PAYROLL DOLLAR

	This Month	Percentage Changes*
TOTAL	$3.29	0.6%
TYPE:		
Cafeteria	**	**
Coffee Shop	3.33	–
Full Menu:		
Tableservice	3.20	– 2.4
Limited Menu:		
Tableservice	3.57	1.4
No Tableservice	**	**

– NO CHANGE
* FROM PREVIOUS MONTH
** INSUFFICIENT RESPONSE

TREND REPORT APRIL 1982 COMPARED WITH APRIL 1981

	SALES % CHANGE			COST % CHANGE				AVERAGE RECEIPT PER COVER	
	TOTAL	FOOD[1]	BEV.[1]	TOTAL	FOOD[1]	BEV.[1]	PAYROLL	APR	% CHG
TOTAL	3.5	3.2	4.8	4.4	5.0	1.1	3.9	$ 8.39	3.0
AFFILIATION:									
Single Unit	2.0	1.1	5.4	5.6	6.1	3.2	5.2	$ 9.39	5.2
Multi-Unit:									
Company-Owned	-0.3	-0.3	*	-1.8	-1.8	*	-1.1	*	*
Franchised	5.0	5.2	4.1	3.8	4.6	-1.1	2.7	8.64	2.0
AREA:									
Northeast	4.0	4.2	-3.4	4.4	4.9	-16.5	2.5	$ 5.46	1.2
Southeast	12.5	14.1	3.6	18.5	18.9	22.6	0.1	*	*
North Central	-5.1	-5.2	-4.7	-6.1	-4.9	-13.2	3.3	6.68	-1.6
South Central	*	*	*	*	*	*	*	*	*
West	7.4	6.6	10.0	9.8	9.5	11.1	7.6	12.15	4.1
SALES PER MONTH:									
Under $39547.	-6.0	-6.2	-3.4	-4.7	-4.8	-3.8	-5.3	$ 4.36	3.1
$39547. TO $58684.	-1.0	-0.4	-6.0	-2.6	-1.0	-20.0	0.8	8.60	-3.6
$58684. TO $90291.	8.8	7.5	25.0	9.1	8.1	28.1	7.7	4.71	4.0
Over $90291.	3.7	3.6	4.1	5.8	6.8	1.4	4.0	11.52	5.2
NUMBER OF SEATS:									
Under 100	8.8	5.8	25.6	8.3	8.3	8.1	9.1	$ 6.09	7.5
100 TO 152	5.1	5.7	*	3.1	3.9	*	4.8	4.53	-6.1
152 TO 216	7.1	6.7	9.1	6.0	6.0	5.4	0.5	9.16	4.1
Over 216	0.5	-	2.2	3.7	4.5	0.5	4.5	9.47	3.9
TYPE:									
Cafeteria	*	*	*	*	*	*	*	$ *	*
Coffee Shop	5.7	5.7	*	3.6	3.7	*	1.3	*	*
Full Menu:									
Tableservice	1.9	1.8	2.3	4.1	5.1	-0.1	4.6	$ 9.83	3.8
Limited Menu:									
Tableservice	17.8	15.5	24.6	10.0	9.6	11.3	9.2	8.53	2.9
No Tableservice	*	*	*	*	*	*	*	*	*
Other	*	*	*	*	*	*	*	*	*

* INSUFFICIENT RESPONSE

\- NO CHANGE

[1] Since all restaurants did not report data for each line, each line item has been analyzed separately and may therefore not add to totals shown.

FOOD AND BEVERAGE SALES REPORT AS OF APRIL 1982

	COMPOSITION OF SALES				TOTAL COST PER DOLLAR OF SALES			
	APR 82		APR 81		APR 82		APR 81	
	FOOD	BEV.	FOOD	BEV.	FOOD	BEV.	FOOD	BEV.
TOTAL	83.1	16.9	83.4	16.6	$ 0.38	$ 0.26	$ 0.38	$ 0.27
AFFILIATION:								
Single Unit	79.3	20.7	80.0	20.0	$ 0.39	$ 0.26	$ 0.38	$ 0.27
Multi-Unit:								
Company-Owned	100.0	*	100.0	*	0.31	*	0.32	*
Franchised	85.2	14.8	85.0	15.0	0.38	0.27	0.38	0.28
AREA:								
Northeast	97.9	2.1	97.7	2.3	$ 0.37	$ 0.31	$ 0.36	$ 0.36
Southeast	86.4	13.6	85.2	14.8	0.38	0.35	0.37	0.29
North Central	82.2	17.8	82.2	17.8	0.36	0.25	0.36	0.27
South Central	*	*	*	*	*	*	*	*
West	75.7	24.3	76.3	23.7	0.40	0.25	0.39	0.25
SALES PER MONTH:								
Under $39547.	93.6	6.4	93.8	6.2	$ 0.41	$ 0.35	$ 0.41	$ 0.35
$39547. TO $58684.	89.3	10.7	88.8	11.2	0.37	0.24	0.38	0.28
$58684. TO $90291.	91.6	8.4	92.7	7.3	0.37	0.26	0.37	0.25
Over $90291.	77.2	22.8	77.3	22.7	0.39	0.26	0.38	0.27
NUMBER OF SEATS:								
Under 100	82.3	17.7	84.7	15.3	$ 0.39	$ 0.28	$ 0.38	$ 0.33
100 TO 152	97.7	*	97.2	*	0.36	*	0.36	*
152 TO 216	81.4	18.6	81.7	18.3	0.39	0.22	0.39	0.23
Over 216	78.5	21.5	78.8	21.2	0.40	0.28	0.38	0.28
TYPE:								
Cafeteria	*	*	*	*	$ *	$ *	$ *	$ *
Coffee Shop	99.7	*	99.7	*	0.33	*	0.34	*
Full Menu:								
Tableservice	78.9	21.1	79.0	21.0	$ 0.40	$ 0.27	$ 0.39	$ 0.27
Limited Menu:								
Tableservice	72.4	27.6	73.9	26.1	0.37	0.23	0.39	0.26
No Tableservice	*	*	*	*	*	*	*	*
Other	*	*	*	*	*	*	*	*

* INSUFFICIENT RESPONSE

PAYROLL AND EMPLOYEE REPORT APRIL 1982 COMPARED WITH APRIL 1981

	SALES PER FTE EMP		PAYROLL PER FTE EMP		COVERS PER FTE EMP		TOTAL SALES PER PAYROLL DOLLAR	
	APR 82	APR 81	APR 82	APR 81	APR 82	APR 81	APR 82	APR 81
TOTAL	$ 2194.31	$ 2108.96	$ 667.85	$ 642.97	273.8	275.6	$ 3.29	$ 3.27
AFFILIATION:								
Single Unit	$ 2296.24	$ 2265.57	$ 788.30	$ 753.80	235.8	246.2	$ 2.91	$ 3.01
Multi-Unit:								
Company-Owned	1393.88	1391.31	358.15	360.29	*	*	3.89	3.86
Franchised	2200.53	2057.06	594.88	576.49	313.3	302.6	3.67	3.53
AREA:								
Northeast	$ 1702.15	$ 1628.61	$ 560.02	$ 547.23	388.3	406.7	$ 3.02	$ 2.98
Southeast	3519.34	3007.11	613.13	591.23	*	*	5.41	4.82
North Central	1756.25	1796.26	625.84	590.13	273.8	274.4	2.77	2.98
South Central	*	*	*	*	*	*	*	*
West	2977.89	2900.44	868.63	844.36	247.9	253.7	3.43	3.44
SALES PER MONTH:								
Under $39547.	$ 2143.12	$ 2186.82	$ 573.09	$ 580.29	433.1	464.4	$ 3.74	$ 3.77
$39547. TO $58684.	1891.36	1909.46	558.03	556.46	298.1	296.4	3.33	3.31
$58684. TO $90291.	1858.90	1742.81	557.89	528.65	408.1	407.9	3.33	3.30
Over $90291.	2487.60	2365.98	772.86	738.25	205.5	208.8	3.22	3.20
NUMBER OF SEATS:								
Under 100	$ 2217.86	$ 2194.44	$ 633.16	$ 634.68	383.6	427.4	$ 3.35	$ 3.36
100 TO 152	1759.16	1674.09	504.06	483.35	348.2	353.4	3.42	3.33
152 TO 216	2431.73	2296.81	670.86	675.71	305.7	291.1	3.65	3.42
Over 216	2317.25	2248.16	757.30	710.55	245.5	248.2	3.06	3.16
TYPE:								
Cafeteria	$ *	$ *	$ *	$ *	*	*	$ *	$ *
Coffee Shop	1616.37	1529.82	484.75	478.39	*	*	3.33	3.20
Full Menu:								
Tableservice	$ 2386.83	$ 2297.87	$ 749.21	$ 707.52	238.2	240.9	$ 3.20	$ 3.24
Limited Menu:								
Tableservice	2699.28	2612.96	756.88	790.65	300.7	302.9	3.57	3.30
No Tableservice	*	*	*	*	*	*	*	*
Other	*	*	*	*	*	*	*	*

* INSUFFICIENT RESPONSE

YEAR TO DATE TREND REPORT APRIL 1982 COMPARED WITH APRIL 1981

	SALES % CHANGE			COST % CHANGE				AVERAGE RECEIPT PER COVER	
	TOTAL	FOOD[1]	BEV.[1]	TOTAL	FOOD[1]	BEV.[1]	PAYROLL	APR	% CHG
TOTAL	1.6	1.6	1.8	3.0	3.0	3.3	2.6	$ 8.47	4.8
AFFILIATION:									
Single Unit	2.6	2.1	4.5	5.6	5.5	6.0	5.4	$10.03	6.7
Multi-Unit:									
Company-Owned	1.5	0.4	6.4	1.2	-	8.9	16.5	2.85	5.6
Franchised	0.8	1.2	-1.7	0.9	1.1	-0.1	-1.3	8.31	2.3
AREA:									
Northeast	1.0	1.0	0.5	3.7	3.7	-1.2	-3.0	$ 5.24	6.4
Southeast	7.9	9.7	-1.9	10.5	9.5	20.0	-2.0	7.71	4.1
North Central	-6.4	-6.4	-6.4	-7.2	-7.0	-8.6	1.2	7.57	0.2
South Central	7.2	7.2	7.3	11.8	13.3	4.6	5.7	6.53	9.0
West	6.2	5.7	7.7	7.2	6.7	10.1	7.9	11.56	6.5
SALES PER MONTH:									
Under $32672.	-3.6	-3.9	0.7	-2.5	-3.0	5.2	-4.3	$ 4.60	7.6
$32672. TO $58950.	-5.4	-5.1	-7.5	-5.5	-5.1	-10.7	-5.6	7.61	-1.4
$58950. TO $90187.	5.6	6.1	2.5	4.9	5.4	-0.1	1.7	6.16	3.9
Over $90187.	2.7	2.6	3.1	5.4	5.3	5.8	6.0	10.06	5.9
NUMBER OF SEATS:									
Under 108	4.2	2.8	11.7	4.1	3.3	9.8	4.6	$ 4.03	10.2
108 TO 160	2.7	2.9	-0.5	3.5	4.0	-7.5	2.1	5.27	1.9
160 TO 248	3.8	3.7	4.6	3.5	2.7	9.8	0.7	9.26	3.8
Over 248	-0.4	-0.5	-0.2	2.3	2.6	1.1	3.2	10.15	4.8
TYPE:									
Cafeteria	*	*	*	*	*	*	*	$ *	*
Coffee Shop	0.9	0.9	5.9	3.9	3.9	15.7	-2.4	2.92	-4.1
Full Menu:									
Tableservice	1.1	1.4	0.1	2.6	2.7	2.2	3.5	$ 9.57	4.4
Limited Menu:									
Tableservice	10.2	7.9	18.2	7.5	6.7	11.9	4.6	8.63	7.1
No Tableservice	2.0	1.1	4.8	4.0	2.7	9.5	18.8	2.83	8.3
Other	1.3	0.6	*	-8.2	-8.6	*	-1.7	4.64	-0.2

* INSUFFICIENT RESPONSE

\- NO CHANGE

1 Since all restaurants did not report data for each line, each line item has been analyzed separately and may therefore not add to totals shown.

YEAR TO DATE PAYROLL AND EMPLOYEE REPORT AS OF APRIL 1982

	SALES PER FTE EMP		PAYROLL PER FTE EMP		COVERS PER FTE EMP		TOTAL SALES PER PAYROLL DOLLAR	
	APR 82	APR 81	APR 82	APR 81	APR 82	APR 81	APR 82	APR 81
TOTAL	$ 2052.40	$ 1998.62	$ 657.71	$ 636.71	209.9	215.8	$ 3.13	$ 3.14
Affiliation:								
Single Unit	$ 2086.12	$ 2010.23	$ 737.52	$ 692.11	201.6	207.4	$ 2.83	$ 2.90
Multi-Unit:								
Company-Owned	1859.69	2006.46	546.45	513.28	637.9	733.5	3.40	3.91
Franchised	2034.58	1986.89	588.40	590.84	298.4	294.8	3.45	3.34
Area:								
Northeast	$ 1561.46	$ 1556.29	$ 536.30	$ 556.50	341.3	371.4	$ 2.91	$ 2.80
Southeast	3298.97	3063.04	584.34	566.11	463.1	456.3	5.48	4.97
North Central	1537.38	1555.08	615.96	580.66	202.2	204.6	2.45	2.63
South Central	2173.24	2105.12	560.36	550.59	322.5	343.4	3.88	3.82
West	2917.90	2822.46	884.22	843.51	251.6	257.3	3.29	3.34
SALES PER MONTH:								
Under $32672.	$ 1837.45	$ 1928.39	$ 563.10	$ 594.51	407.3	439.6	$ 3.20	$ 3.18
$32672. TO $58950.	1705.41	1795.85	543.79	568.85	275.4	284.8	3.16	3.14
$58950. TO $90187.	1894.42	1791.65	591.06	581.89	336.4	334.9	3.20	3.07
Over $90187.	2271.73	2169.97	736.73	688.14	219.1	223.0	3.08	3.15
NUMBER OF SEATS:								
Under 108	$ 1925.24	$ 2039.24	$ 602.10	$ 629.88	497.1	610.3	$ 3.15	$ 3.17
108 TO 160	1717.36	1657.81	530.98	523.02	366.7	359.1	3.16	3.11
160 TO 248	2562.58	2501.09	670.25	665.34	322.8	318.1	3.86	3.75
Over 248	2014.45	1942.57	721.96	677.21	196.4	199.3	2.79	2.87
TYPE:								
Cafeteria	$ *	$ *	$ *	$ *	*	*	$ *	$ *
Coffee Shop	1528.46	1520.47	501.55	514.29	365.1	353.6	3.05	2.95
Full Menu:								
Tableservice	$ 2193.64	$ 2109.56	$ 701.26	$ 662.17	224.4	225.6	$ 3.14	$ 3.19
Limited Menu:								
Tableservice	2381.79	2335.15	768.36	793.37	271.2	285.5	3.10	2.94
No Tableservice	2428.57	2747.72	713.98	692.38	795.3	991.2	3.35	3.92
Other	2267.30	2252.63	679.58	695.90	557.5	514.3	3.34	3.24

* INSUFFICIENT RESPONSE